

LOCAL GOVERNMENT

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Publications

BULLETIN 33

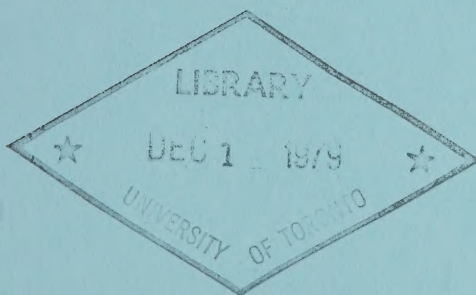
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INFORMATION GATHERING SERVICES AND TECHNIQUES

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Ontario Ministry of Intergovernmental Affairs

Hon. Thomas L. Wells
Minister

D.W. Stevenson
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Local Government Division
Municipal Administration Branch


October 1979

To the Municipal Clerk:

Please circulate this bulletin or make copies for distribution to councillors or staff of your municipality who may be interested in the subject. Additional copies are available at fifty cents each from the Publications Centre (see page 14).

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INTRODUCTION

A new problem has just come across your desk. It is something you have never had to deal with before, and it is going to take a lot of your valuable time to solve. It may mean working extra hours; it may mean asking for an extension of the deadline council has given you for finding an answer; it may mean re-inventing the wheel.

As it is with other problems that have cropped up, you are fairly certain that someone has already dealt with this issue. Perhaps the details are not exactly the same as in your problem, but if you could just find out what other people have done, you could at least see what methods were used for tackling the issue. Perhaps the situations are almost parallel, and you will be able simply to change the names and dates.

The big question is how to find out who did what!

Part One of this bulletin looks at research mechanisms and public-sector organizations that are available to the local-government community. It discusses the services offered by various organizations and the way in which these services can be made available to an individual municipality. Part Two examines some of the "tried and true" mechanisms that individuals can use for getting information from other municipalities, and for developing personal research capabilities.

PART ONE

RESEARCH ORGANIZATIONS

Most large businesses have research-and-development divisions. Small businesses have also grouped together to form research agencies. Municipal government is big business, and there are several groups devoted to providing research facilities or carrying out research projects on behalf of local governments. Each provides a unique service, and each can be helpful to an individual local government.

1. THE INTERGOVERNMENTAL COMMITTEE ON URBAN AND REGIONAL RESEARCH

The Intergovernmental Committee on Urban and Regional Research is an information exchange service, aimed at fostering communications and exchanges of documentation. The office is located in Toronto.

ICURR's operation involves the collection, recording and dissemination of information on research and projects undertaken or commissioned by Canadian governments. The information is recorded in a computerized, bibliographic file, under the four broad categories of housing and building; municipal and urban affairs; rural and regional development; and environment, recreation, and transportation.

Using the ICURR service is relatively simple. It usually takes no more than a telephone call or short letter to outline the topic on which you need information. The question might be as complex as downtown redevelopment, or as specific as the type of identification used on fire-fighting vehicles. ICURR feeds the question into the computer which will respond with all the titles of publications and reports relative to the subject. If the list is too long for quick reference, additional qualifications can be added to the computer request, thereby reducing the number of responses. As an example, you might start out by asking for all pertinent information on a subject, and get 100 citations. Limiting this to Canadian information might result in 25 citations, and a further limitation to just those documents produced within Ontario could

reduce this number to 10. Local-government subscribers to ICURR can choose between two types of service:

A. Basic Service (\$50 per year)

- Weekly Information Cards: descriptive summaries of projects and programs undertaken or recently completed by, or for, governments in Canada at all levels, plus a semi-annual Index of cards published.
- Interaction: an informal, bi-monthly bulletin outlining recent legislation, work in progress, conferences and events, new publications, other information sources and current ICURR activities.
- Calendar: a thrice-yearly listing of conferences and other events in the general areas of urban and regional affairs.
- Directory: a loose-leaf binder containing organization charts of federal, provincial and territorial agencies involved in urban and regional affairs. (Sent only upon request.)

B. Comprehensive Service (\$100 per year)

- All of the publications listed in the first category.
- The loan of documents from ICURR files.
- The opportunity of calling upon the information resource staff for general consultation and referral.
- An unlimited number of computer searches, providing customized listings on specific topics.

Occasionally ICURR offers special publications for which there is an extra charge, and which are sent only on request.

For additional information contact:

Intergovernmental Committee On
Urban and Regional Research
36 Wellesley Street West
Toronto, Ontario
M4Y 1G1
Telephone: (416) 920-7712

2. BUREAU OF MUNICIPAL RESEARCH

This Toronto-based organization has been operating for over 50 years, producing special studies and pieces of research for the municipal-government community.

The BMR makes its services available to all municipal governments within Ontario - even those who are not members of the Bureau. If a request for information from a municipality concerns a matter being researched, the question will be incorporated in the investigations. If it requires only a few hours of work, the question will be answered quickly. A matter that would require lengthy research will be weighed against other BMR priorities.

Membership in the BMR ranges from \$350 for a small municipality to \$2,500 for the largest. Membership allows a municipality to receive as many copies of BMR publications as needed for distribution to staff; all special mailings; invitations to BMR-sponsored seminars; and makes municipalities eligible for inclusion in case studies being developed.

The BMR conducts research into most aspects of municipal government. Among recent publications are those dealing with Pet Control; What Can Municipalities Do About Energy?; Changing the Planning Act; Food for the Cities (farmland preservation).

For more information contact:

C. K. Bens
Executive Director
Bureau of Municipal Research
2 Toronto Street, Suite 306
Toronto, Ontario
M5C 2B6
Telephone (416) 363-9265

3. YOUR LOCAL LIBRARY

Libraries throughout Ontario now are tied in to computer-based search facilities. Even

the smallest libraries can connect you with this service through the Regional Library System.

The principle of the search is similar to that used by ICURR, in that computers are programmed to tell you what materials have been published on the specific subjects that interest you. You would ask the computer to provide you with materials on, say, street lighting, and it would respond with the author, title, source, and date of relative articles or books, often with an abstract of the material. Among the on-line search services available, and the number of sources from which they can retrieve information are: Dialogue (about 100 sources); Orbit (50); Infobank (40); Info Globe (complete texts of Globe and Mail articles since November, 1977). Most libraries can also connect you with QL Systems (Quick Law). While Ontario statutes are not yet available on QL Systems, most other provinces are included.

There is a cost attached to any on-line research. This includes the time of the computer and a small charge for the citations. Check with your local librarian for more detailed costing.

The library also offers, of course, the services of trained research librarians who can direct you to relevant publications within the library, help you in getting specific publications within the library or through inter-library loan. There is no charge for this service.

4. MUNICIPAL ASSOCIATIONS¹

Most of the municipal associations provide research facilities, either directly through the publication of materials or topics covered at seminars and conferences, or indirectly through the contacts made at meetings. Examples include the wage and salary survey carried out by the Association of Municipalities of Ontario (A.M.O.); the by-laws gathered by the Association of Municipal Clerks and Treasurers of Ontario (A.M.C.T.O.); and the personnel and bargaining information available through the Ontario Municipal Personnel Association. A vast body of knowledge is available through the offices of the Municipal Liaison Committee (M.L.C.) and the Association of Counties and Regions of Ontario (A.C.R.O.). Do not hesitate to call the secretariat of these agencies. Less formal, but equally useful, information is

¹ For addresses, telephone numbers, and names of people to contact, see pages 168-171 of the Municipal Directory (1979).

available through the executive and members of all other groups.

5. UNITED STATES RESOURCES

There is a good selection of research material coming from municipal-government agencies in the United States. While some of the material is not immediately useful to the Ontario situation, much of it bears on current or developing local problems. Since many American cities are more "mature" than those in Canada, problems being encountered in the U.S. can provide useful hints for Canadians - sometimes on how to prepare for eventualities, and sometimes on how to avert problems.

International City Management Association

Much of the specifically useful material is published by the International City Management Association (ICMA) through its "Urban Data Service" and "Management Information Service".

Urban Data Service is a monthly report that analyzes, through statistics, trends and management systems within municipal government. It looks at salaries; manpower; individual municipal services such as police, libraries, cemeteries; and such matters as organization structure and funding from senior levels of government.

Management Information Service includes five separate functions in a single subscription:

- Inquiry Service - MIS provides rapid response to questions sent in by letter or telephone, drawing on vast available sources including statistical data, model ordinances (by-laws), periodical literature, special studies.
- Monthly Reports - These reports cover a wide range of subjects of practical interest to local government, from innovations in hard-service delivery and maintenance to techniques of management. Over 2,000 earlier reports are available for order. Among recent reports are those on: Salaries of Municipal Officials; The

Era of Fiscal Restraint;
Police/Fire Consolidations
in Municipalities Under
10,000; Citizenship Par-
ticipation in Urban Fiscal
Problems.

- Public Management - This urban affairs magazine is sent as part of the subscription. Articles in each issue cover a single subject of current interest from several points of view, such as: Building the Municipal Leadership Team; Financial Forecast; Energy; Risk Management.
- Municipal Year Book - Referred to as a "must" reference, this 400-page book annually summarizes activities of more than 3,000 cities, including well over a hundred Canadian municipalities. There are also many useful statistics.
- Occasional Papers - These micro reports are issued irregularly and are available on request.

For information on the cost to your municipality of these and other ICMA publications and services, contact:

International City Management Association
1140 Connecticut Avenue Northwest
Washington, D.C.
U.S.A. 20036

4. MUNICIPAL FINANCE OFFICERS ASSOCIATION

Publications of the Municipal Finance Officers Association (MFOA) are ideal sources for individuals seeking information in accounting, budgeting, retirement administration, debt management, treasury management and many other areas of public administration. The books vary in price, and a discount is available to MFOA members. Of particular interest now is a new publication titled State and Local Government Finance and Financial Management: A Compendium of Current Research. This particular volume costs \$16.20 and includes both a series of topical essays and an inventory of research.

In addition, MFOA offers a single subject Special Bulletin, Analysis, Survey, and Study series of publications. There is a semi-monthly newsletter and a quarterly journal.

For further information on the cost to your municipality of these and other services contact:

Municipal Finance Officers Association
180 North Michigan Avenue
Suite 800
Chicago, Illinois
U.S.A. 60601.

PART TWO

CONDUCTING YOUR OWN RESEARCH

There will always be times when you know that no one has ever done the type of research you are faced with, and that you will have to find some method of personally doing it. This is usually time-consuming and, if you are already a member of an organization that provides on-line research, you should check through to make sure your hunch is correct.

If you do have to perform the task yourself, there are a number of methods at your disposal. But always remember that you are not looking for the quickest answer, but the most appropriate answer. A little time spent in planning the research or developing your own information sources will usually pay big dividends.

1. CONDUCTING A SURVEY

There are two key elements to conducting a survey. The first is making sure that the people you survey will be able to provide you with relevant information. The second is making sure that the questions you ask will result in the information you need.

In most cases it would be unnecessary for you to survey all municipalities in Ontario. This would be both costly and time-consuming, and many of the responses probably would have no direct relationship to your problem. You will probably be much better off by selecting about ten municipalities similar to your own municipality. Some of the things you might consider in picking these matching municipalities are:

- Population (or number of households). Look not only for places that have about the same population number as your municipality, but have similar types of population - small farming hamlets, large industrial communities, similar economic situations, similar employment characteristics. And keep the number of households in mind. A municipality with a smaller year-round population might still be a good match for yours if it has a sizeable cottage population.

- Geography. If your survey concerned, for example, sewer or water installations, there would be very little correlation between farming and mining areas. You should attempt to match on the basis of topography, soil, and perhaps climate.
- Forms of municipal government. You will likely get quite different answers from townships or towns that are part of a restructured second-tier government than from those that are part of a county. A third type of answer may well come from municipalities in the north where there is neither county nor regional government.

Even with this matching you may find wide disparities in the responses to your survey. There are many reasons for this. Usually they result from external conditions you might not be familiar with.

As an example, you might be looking for salary information for a new job that council is considering establishing. You would check to see what municipalities have a similar position and then select for your survey those that match your municipality best.

You might find that the salary is very high in one municipality and very low in another, with the majority grouped around an intermediate figure. Further checking might show that in the "high" municipality there is a great deal of pressure on wages because of a specific type of industry. It could be that the council there places great emphasis on that service or function, and has paid a high wage to attract a "hot-shot". In the "low" municipality you might find there is very little activity in that service or function, and that the position is really part-time work for someone fully employed in another field.

In these cases it is often acceptable to eliminate both the high and low figures from a survey, and to base your calculations on the rest. It is a common sampling technique.

Most municipal employees in Ontario respond quickly and efficiently to surveys, but they also complain about having to fill in a lot of unnecessary data. Don't put anything in

the questionnaire that you can quickly answer yourself. A glance at the Municipal Directory will tell you population, acreage, number of households, and names and addresses of appropriate officials. You can fill in this sort of information as quickly as anyone who might be responding to your survey.

Do not ask the type of question that will require long, involved explanations. You might not have the time to sort through them, and the respondents might not have the time to fill them in. Ask simple, straight-forward questions, and suggest that if there is a special circumstance surrounding the question, the respondent might include a copy of pertinent by-laws or other relevant documents. Always leave space for those who are willing to explain a matter in detail.

Always offer to send to the respondents the result of your work. If you are having to research this specific matter, there is every likelihood that someone else is faced with the same problem. They will probably be as interested in the raw data you collect as the final document you prepare.

2. TELEPHONING THE EXPERT

There are probably colleagues in neighbouring municipalities who are able to answer many of the questions you might have. Don't hesitate to call a friend, but make sure you understand the problem before you make the call. Few things irritate more than a person who doesn't understand his own question.

If your problem is technical in nature, one well-placed call will likely give you a helpful response. If the question is more involved, you would be wise to make two or three calls. Make sure that each person is aware of the fact that you are surveying several municipalities, and again, offer to share the results of your survey with each person.

If you can't readily think of an individual or group of people who can provide you with the answer, go through the same selection process you would use for a written survey. The time spent will be well worth the effort.

Beyond your own colleagues within municipal government, there is a wide variety of people

and organizations who can either provide you with answers, or direct you to appropriate sources. The field offices of the Ministry of Intergovernmental Affairs, listed on the last page of this bulletin, can provide you with much information. Resources available at the field offices include: current and pending legislation; up-to-date information on regulations and court decisions; publications of significance to municipalities; financial statements of all municipalities in the area; an extensive collection of research and statistical materials, sample notices, by-laws and procedures; access to the Ministry library (and current periodical service); lists and copies of provincial government publications.

The M.I.A. field offices will also be able to help municipalities get in touch with appropriate offices of other ministries and the agencies serving local government.

Your professional and municipal associations can also provide you with invaluable assistance. Mentioning a problem at a meeting or seminar will often result in parts of the solution if not the total solution. Most people are happy to help to the extent that they are able.

3. SETTING UP A RESEARCH FILE

Probably every time you read a journal, or even the newspaper, you find something that you would like to save. You may even have a pile of clippings or dog-eared magazines sitting around in the office. Newspapers have long used a system called the "morgue" in which clippings are filed by subject or name in envelopes rather than in traditional files. This is an inexpensive system from which materials can easily be retrieved. You can also go through these files periodically and toss away dated material. It takes little time to maintain this type of "morgue", and it can keep you on top of issues, or at least able to respond quickly to questions. You may even find it wise to cut up a copy of council's minutes and store the pertinent sections in your morgue. Remember to date each clipping, and develop some method of citing the source so you can accurately quote the material if needed.

CONCLUSION

When decisions are based on incomplete information, they are often not the most appropriate decisions. This bulletin has examined some of the methods by which you can enlarge your information base. But there will always be problems that go beyond either the capability or the willingness of the individual, and that is the time to call in the experts. There are many consulting firms throughout Ontario that specialize in carrying out studies in nearly every aspect of municipal government. Don't call in the consultants for work that you can handily and efficiently do yourself, but don't hesitate to call if you feel the problem is beyond your capacity.¹ Good decisions usually save money and time, even when you add in the money and time spent in getting the information on which to base that decision.

¹For an examination of how and when to use consultants, see Getting More for Consulting Dollars, a Management Advisory Publication of the Advisory Services Branch, Ministry of Treasury, Economics and Intergovernmental Affairs. Copies are available for \$3.00 from the Publications Centre. (See next page for address.)

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Copies of all the bulletins in this series are available at \$0.50 each, prepaid, from:

Publications Centre
880 Bay Street, 5th Floor
Toronto, Ontario
M7A 1N8

(Please make cheques payable to the Treasurer of Ontario)

A series of Financial Procedures Bulletins is being issued by the Municipal Budgets and Accounts Branch. Copies are available at \$1.00 each from the Publications Centre. Titles now available are:

- F.1 Cash Management in Municipalities
- F.2 Bank Reconciliation Procedures for Municipalities
- F.3 Municipal Investments
- F.4 Zero-Base Budgeting
- F.5 Reserves, Reserve Funds, Allowances
and Other Special Funds, July 1979, 30 pp.

Prices subject to change without notice.

For additional information on this subject, get in touch with any of the field officers of the Local Government Division. They are located at these addresses.

BRANTFORD

172 Dalhousie St.
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N3T 2J7
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